

HANDOUTS AVAILABLE FOR CONSERVATORSHIP EDUCATION



“Probate Conservatorship Self-Help Overview **Participant Notebook”**

Part I – Introduction and Welcome

- 1. Conservatorship Quick Reference**
 - 2 page explanation of alternatives and broad picture of different types of conservatorships. Might make good beginning for broad info handout.
- 2. What to Expect**
 - 4 page overview of court process from filing, notice, visit from Court Investigator, checking probate notes, attending the hearing and then what could happen later if your Petition was granted and what you might be responsible if you don’t succeed. Very informative, but lots of information in a small amount of space.

Part II – Becoming a Conservator

- 1. Conservatorship Timeline**
 - Chart lays out timing for activities in case. Good training material, especially as it highlights all the post-petition activities which are now required of a conservator.
- 2. Family Tree**
 - Diagram of relatives requiring notice, plus information regarding personal and mailed notice for particular individuals. Would make good addition to self help packet on conservatorships.
- 3. List of Required Documents and Notice Requirements**
 - 1 page checklist for all forms required in a typical filing, plus cheat sheet on 5 & 15 day notice periods
- 4. Declaration Regarding Notice for Temporary Conservatorship**
 - Pleading form to prove notice for temporary conservatorship. Complies with Probate Code §2250 regarding the need of the petitioner to make an effort to find out the relatives’ opinions regarding the proceeding and also how the proposed conservatee feels about it.

5. Declaration in Support of Dispensing with Notice

- Simple due diligence declaration pleading form.

Part III – Duties of a Conservator and Letters {THESE ARE JUST THE FORMS}

1. Probate Conservatorship Duties (Form GC-348)
2. Letters of Conservatorship (Form GC-150)

Part IV – Assessing the Conservatee’s Needs

1. Worksheet: What are the Conservatee’s Needs?

- Checklist of needs gives a practical framework for the self represented person to assess the physical and emotional needs of the proposed conservatee. Conservatorship must be the “least restrictive alternative”. This checklist may also help petitioner prepare for hearing and discussions with Court Investigator. Also useful for creating the Level of Care Plan needed within 60 days after appointment.

2. Initial Assessment/Evaluation Worksheet

- Template for assessment of facilities where the proposed conservatee may be placed. Under Probate Code §1835, the superior court is supposed to provide information to private conservators about the rights of the conservatee, how to assess the needs of the conservatee, etc.

Part V – Taking Care of the Conservatee

1. Keeping the Conservatee Healthy and Safe Checklist

- Medical needs checklist. Provides form to record all relevant information.

2. Levels of Care of Services Available – Summary

- Explains what is meant by “Levels of Care”, which ranges from independent living all the way through lock-down facilities.

3. Checklist for Selecting a Care Facility

- Great tool for helping pick a facility, as it brings up relevant issues – closeness to relatives, activities available at location, assessment of living conditions, fire sprinklers, etc.

4. How to Choose a Residential Care Facility for the Elderly

- Same information as the Checklist for Selecting a Care Facility, just slightly different format

5. Ways to Enhance Quality of Life at Home or in a Care Facility

- Common sense tips for the conservator on how to make the experience better for the conservatee, such as bringing the person their favorite foods & beverages, placing familiar objects in the room, arranging for outside trips, and thanking the staff.

6. Record of Medications – Sample Form

- Chart which the conservator could use to keep the medications organized on paper.

7. Ways to Help the Conservatee Eat Well

- More commonsense tips on how to monitor what is happening with the conservatee.

8. Clothing Tips

- And even more tips . . .

9. Social Activity Log – Sample Form

- Chart to track the outings and friend meetings. Could be helpful to show Court Investigator during the regular court check ups that conservatee is receiving appropriate care.

Part VI - Resources

1. Health Information Organizations

- List of sources and phone numbers/websites for health information

2. Resources for Senior Services

- Explains various resources which might be available, such as in home services, meal programs, caregiver support information.